



TRICARE Management Activity

**Protected Health Information Management Tool
(PHIMT)**

**Training Reference: Regular User Manual
Version 1.0**

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This page lists all of the changes that have been made to the PHIMT Regular User Manual throughout its development.

Version	Release Date	Summary of Changes

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1.0 INTRODUCTION TO PHIMT

The Privacy Rule of the Health Insurance Portability and Accountability Act (HIPAA) of 1996 requires a covered entity, (i.e., the Military Health System (MHS)) to maintain a history of when and to whom disclosures of Protected Health Information (PHI) are made for purposes other than treatment, payment and healthcare operations (TPO). The MHS must be able to provide an accounting of those disclosures to an individual upon request. Authorizations and Restrictions from an individual to a covered entity are included in the information that is required for tracking purposes.

To comply with the requirements for disclosures, TRICARE Management Activity (TMA) is providing an electronic disclosure-tracking tool. The Protected Health Information Management Tool (PHIMT) stores information about all disclosures, authorizations, and restrictions that are made for a particular patient. PHIMT has a functionality built into it that can provide an accounting of disclosures, if necessary.

The MTF should have knowledge of DoD 6025.18-R, Health Information Privacy Regulation. A MTF must provide an accounting of disclosures within 60 days of the request. If the covered entity cannot honor an accounting of disclosures within the 60-day period, it must provide information to the requestor as to the reason for the delay and expected completion date. The covered entity may extend the time to provide the accounting by no more than 30 days. Only one extension is permitted per request.

1.1 PHIMT Requirements

Before using PHIMT it is necessary to understand and ensure the operating requirements are met. PHIMT has specific requirements for the operating system, browser, and plug-ins.

1.1.1 System Requirements

Using PHIMT requires a Microsoft Windows application: Windows XP (home, professional); Windows 2000 (standard, professional, advanced); or Windows 98.

***NOTE:** Windows NT does work with PHIMT in most cases, but some limitations may exist. Therefore, Windows NT is not supported for use with PHIMT.*

1.1.2 Browser Requirements

PHIMT requires the use of Microsoft Internet Explorer, version 6.0 or above.

***NOTE:** Cookies and JavaScript should be enabled (these items are enabled in a default browser installation)*

1.1.3 Plug-Ins

PHIMT requires the use of Adobe Acrobat, version 6.0 or above. The application will also work with version 5.0 but the latest version is recommended.

***NOTE:** To display the generated letters and reports in the browser, the Adobe Acrobat Plug-in is required. This is normally installed with Adobe Acrobat Reader. Download Adobe Acrobat for free at <http://www.adobe.com>.*

2.0 GETTING STARTED

In PHIMT, the Regular User is considered to be a general user role with basic functionality. This individual is responsible for performing various disclosure activities such as creating disclosures and authorization requests that can be routed to a Privacy Specialist.

2.1 User Definitions And Roles

Each User is assigned to one or more organizations. An organization is a logical or physical entity such as an MTF, a Service or TMA.

- Within an organization, each user can have one or more roles.
- A user can have the same roles in multiple organizations, or different roles in multiple organizations.
- Roles are inherited down the permission levels

A Role is a named collection of permissions. Roles allow Users with the same permissions to be grouped under a unique name. PHIMT roles include: Regular User, User Admin, Privacy Specialist, and Tool Admin.

- A **Regular User** is a general role with basic functionality. This role can create disclosures and authorization requests that can be routed on to a Privacy Specialist.
- A **User Admin** is a local administrator for an MTF or a designated Service. This role allows one to add/modify users from within their Service and assigns roles.
- A **Privacy Specialist** is the Privacy Officer or designee at an MTF or Service level. This role allows the User to maintain disclosure reporting, approve/deny disclosure requests, amend requests, and restrict and suspend disclosures.
- A **Tool Administrator** has global access to the application and will be maintained by the HIPAA Support Center. This role allows the User to configure roles within MTFs, and create permissions within the application.

***NOTE:** Your particular user role will determine the PHIMT activities you are authorized to perform. For example, as a Regular User, you can perform only those activities listed on the User, Patient, Requests, and Requester tabs. Different user roles are authorized to access different tabs.*

2.1.1 PHIMT Roles and Permissions

PHIMT roles and permissions are based on status-level relationships within service groups. These service groups consist of the Army, Navy, Air Force, and Coast Guard. Anyone in a given service group can be granted access to information required for them to perform their duties. Specific roles have corresponding permissions that determine who will have access to what. Individuals within PHIMT roles have access to information required for job performance as well as access to information accessible to those roles with fewer permissions. No individual will be granted access to information needed to perform duties that require a higher set of permissions. Those in roles with the highest levels of permissions will have access to all information within their service group. No individual within any service group will be granted access to information in a service group other than their own.

For example, TMA and Support, Group A the top tier, occupies those roles with the highest levels of permissions. These individuals are granted access to all information within their Service Group. Those individuals in the Service Groups who occupy roles requiring a lower level of permissions, Group B the second tier, do not have access to the information accessible to those in the top tier. However, Group B does have access to the information in tier C, comprised of roles requiring even lower permission levels. The third tier, Group C, is comprised of offices and command centers within the service groups. This tier can only access information necessary for them to complete their responsibilities. They do not have access to information within the higher tiers. There is absolutely no viewing of another's information outside of your own service group.

2.1.2 Regular User Role

In PHIMT, the Regular User can create disclosure and authorization requests that can later be routed to a Privacy Specialist. They can review patient profiles, record accounting of disclosures, and revoke authorizations.

3.0 ACCESSING AND USING PHIMT

Now that you have an understanding of why PHIMT was developed, are familiar with its capabilities and system requirements, and have a basic understanding of your role as a Regular User, you are ready to access the application.

To login to the PHIMT application:

1. Enter the URL for PHIMT into the Web browser,
<https://phimt.tricare.osd.mil>.



2. Read the Notice and Terms of Use.
3. Click on the Accept button.



TRICARE

DEPARTMENT OF DEFENSE
UNITED STATES OF AMERICA

MHS Protected Health Information Management Tool

THIS IS A DOD COMPUTER SYSTEM. THIS COMPUTER SYSTEM, WHICH INCLUDES ALL RELATED EQUIPMENT, NETWORKS, AND NETWORK DEVICES (SPECIFICALLY INCLUDING ACCESS TO THE INTERNET), ARE PROVIDED ONLY FOR OFFICIAL U.S. GOVERNMENT BUSINESS. DOD COMPUTER SYSTEMS MAY BE MONITORED BY AUTHORIZED PERSONNEL TO ENSURE THAT THEIR USE IS AUTHORIZED, FOR MANAGEMENT OF THE SYSTEM, TO FACILITATE PROTECTION AGAINST UNAUTHORIZED ACCESS, AND TO VERIFY SECURITY PROCEDURES. MONITORING INCLUDES "HACKER" ATTACKS TO TEST OR VERIFY THE SECURITY OF THIS SYSTEM AGAINST USE BY UNAUTHORIZED PERSONS. DURING THESE ACTIVITIES, INFORMATION STORED ON THIS SYSTEM MAY BE EXAMINED, COPIED AND USED FOR AUTHORIZED PURPOSES AND DATA OR PROGRAMS MAY BE PLACED INTO THIS SYSTEM. THEREFORE, INFORMATION YOU PLACE ON THIS SYSTEM IS NOT PRIVATE. USE OF THIS DOD COMPUTER SYSTEM, AUTHORIZED OR UNAUTHORIZED, CONSTITUTES CONSENT TO OFFICIAL MONITORING OF THIS SYSTEM. UNAUTHORIZED USE OF A DOD COMPUTER SYSTEM MAY SUBJECT YOU TO CRIMINAL PROSECUTION. EVIDENCE OF UNAUTHORIZED USE COLLECTED DURING MONITORING MAY BE PROVIDED TO APPROPRIATE PERSONNEL FOR ADMINISTRATIVE, CRIMINAL, OR OTHER ACTION.

PRIVACY ACT WARNING

INFORMATION CONTAINED IN THIS SYSTEM IS SUBJECT TO THE PRIVACY ACT OF 1974 (5 U.S.C. 552A, AS AMENDED). PERSONAL INFORMATION CONTAINED IN THIS SYSTEM MAY BE USED ONLY BY AUTHORIZED PERSONS IN THE CONDUCT OF OFFICIAL BUSINESS. ANY INDIVIDUAL RESPONSIBLE FOR UNAUTHORIZED DISCLOSURE OR MISUSE OF PERSONAL INFORMATION MAY BE SUBJECT TO FINE OF UP TO \$5,000.

Accept

Log in using the User Name and temporary Password that has been assigned to you by your User Admin.

4. Type in User Name and Password.
5. Click on the Login button.



TRICARE

DEPARTMENT OF DEFENSE
UNITED STATES OF AMERICA

MHS Protected Health Information Management Tool

You are logging into the production server.
Information in this version will be retained.

User Name:

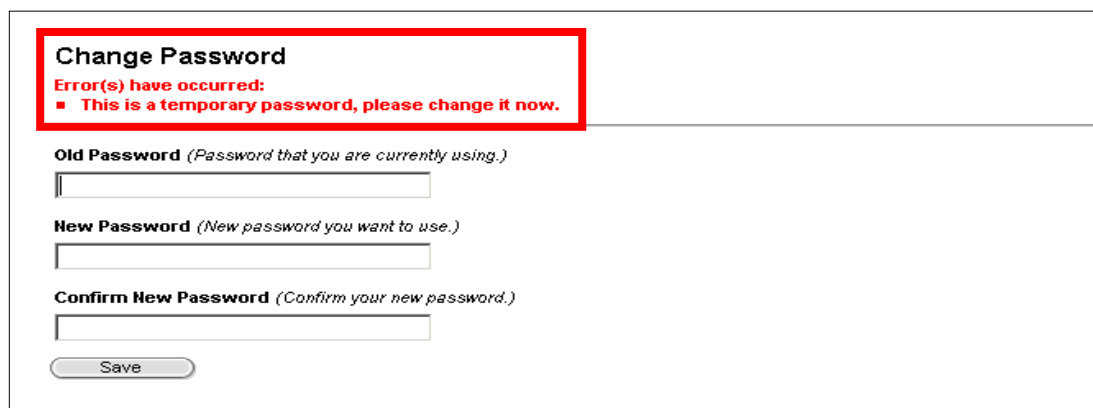
Password:

Login

Enter your User Name and Password to login.

The first time you login you will be prompted to change your temporary password. Your new password must be 8 to 15 characters long and contain at least one of the following:

- Alphabetic uppercase character
- Alphabetical lower case character
- Arabic numeral (0,1,2,3,4)
- Non-alphanumeric special character (ex: !, @, #, \$, etc.)



Change Password

Error(s) have occurred:

- This is a temporary password, please change it now.

Old Password (Password that you are currently using.)

New Password (New password you want to use.)

Confirm New Password (Confirm your new password.)

Save

After logging in, PHIMT will bring you to the Regular User tabs.

4.0 REGULAR USER TABS

After having logged into PHIMT, you will notice four Regular User tabs. Each tab contains hyperlinks that are used to perform various disclosure activities. The four tabs are:

- User
- Patient
- Requests
- Requester

4.1 User Tab

The User tab (shown below) contains all PHIMT user related information. It is designed to track all tasks that are assigned to you. The User tab allows you to perform “desk duties” such as updating your user profile information, viewing requests you have made, viewing your tasks, and switching your organization. As a Regular User in PHIMT you will have access to four hyperlinks on the User tab. The four hyperlinks include:

- My Profile
- My Requests
- My Worklist
- Switch Organizations

Thursday, February 10, 2005 [Patient Search](#) [Logoff](#)

Patient **User** Requests Requester

Current User:
Miller, Erin
US TMA

My Profile
My Requests
My Worklist
[Switch organizations](#)

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
edit 389	312	Request Approval (Disclosure)		Kramer, Peter	Kramer, Peter	Action Pending	02/03/2005

4.2 Patient Tab

The patient tab (shown below) provides the Regular User with patient specific activities. Information can be obtained by entering a particular patient name. To access the PHIMT database, you must first select a patient. The Patient tab allows you to perform patient related activities including performing the patient search and updating the patient's profile. These activities can be performed when accessed by the following hyperlinks:

- Patient Profile – look at the profile of a particular patient with and edit patient information
- Patient Search – look for a particular patient in the PHIMT database.

Thursday, February 10, 2005 [Patient Search](#) [Logoff](#)

Patient **User** Requests Requester

Current Patient:
None

Patient Profile
[Patient Search](#)

Patient Search

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))
 - - -

- OR -

by Name (Last) (First)
 ,

- OR -

by System ID (the identifier created by this system for the person)

4.3 Requests Tab

The Requests tab (shown below) allows the Regular User to access information about the activities requested by an individual or an organization. Using this tab you can view patient related activities that have been requested by you or by another individual or organization, such as a disclosure (for a release of PHI) or disclosure accounting (process a justification for a disclosure). These activities can be performed when accessed by the following hyperlinks:

- Create New Request – initiate a request for a new disclosure activity.

- Search for Request – look for a particular request placed within your organization.

Thursday, February 10, 2005 Patient Search Logoff

Patient User **Requests** Requester

Current Request: None

Create New Request

Select Request Type

- Create New Request
- Search for a Request

☐ Disclosure

☒ Disclosure Accounting

4.4 Requester Tab

The Requester tab allows the Regular User to access information about the individual or agency making a request for the disclosure. Using this tab you can view information about the requesting individual or organization. These activities can be performed when accessed by the following hyperlinks:

- Requester Summary – view a synopsis of all requests you initiated
- Requester Requests – view a listing of all requests you have made
- Requester Profile – view information about the originator of the request
- Requester Search – search for the originator of the request

Thursday, February 10, 2005 Patient Search Logoff

Patient User Requests **Requester**

Current Requester: None

Requester Search

Choose one of the following options:

A. Select a Third-Party Organization (a third-party requester, such as a law enforcement agency or insurance company)

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220 Select

B. Search for a Person (search for another person, or add a new one*)

Name (Last) (First) An "*" may be used as a wildcard.

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records

☒ Include Non-Patient Records

Search

C. Search for an Organization (search for another organization, or add a new one*)

Name (All or part of the name of the organization. An "*" may be used as a wildcard.)

DMIS Code (the external identifier for the organization)

Search

* You must search for an existing requester or requesting organization before adding a new one.

5.0 UNDERSTANDING PHIMT SCREENS

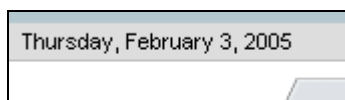
Each tab of the PHIMT screens contains some basic information that will be helpful to you when performing the various activities.

5.1 Screen Features

There are many features to the PHIMT screens that you can use to navigate your way through the many disclosure activities you will perform. These features are discussed here.

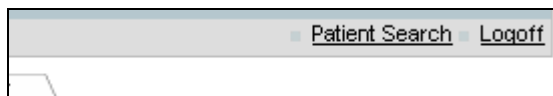
5.1.1 Date

The date displays the current weekday, month, day, and year in the upper left corner of the screen.



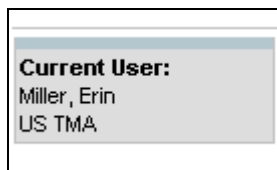
5.1.2 Navigational Options

Navigational options, such as user search and logoff, provide directional hyperlinks that will help you to proceed through the PHIMT application. They are located in the upper right hand corner of the screen.



5.1.3 Status Box

The gray status box shows current information and is located in the upper left hand corner of all PHIMT screens. The box displays the current user, user information such as organization and assigned role, patient information, and information about what disclosure activity is currently being performed. This information is updated when making inputs for various activities.



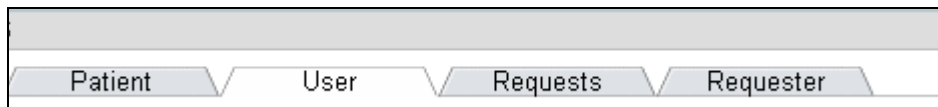
5.1.4 Activity Hyperlinks

The activity hyperlinks are located under the status box, on the left hand side of the screen. This listing consists of hyperlinks for activities that can be performed while in a specific “tab.” The hyperlinks may include: my worklist, patient profile, or authorization; depending on which tab you are using. Your user role will determine specific hyperlinks listed.



5.1.5 PHIMT Screen Tabs

PHIMT screen tabs are labels that are located at the top of the display screen. The tabs serve as file folders for different groupings of activities. The specific tabs will vary depending on what role you are assigned. Regular User tabs include: User, Patient, Requests, and Requester. Each tab allows for different activities.



5.1.6 Screen Title

The screen title is located directly under the tabs and above the display screen. This is the title of the particular screen being displayed (ex. user worklist, patient search results)



5.1.7 Display Screen/Application Window

The display screen/application window is the PHIMT users work area. These screens contain various fields in which to provide required information for proceeding through the PHIMT activities. To assist with data input, PHIMT provides text boxes, windows, calendar icons, and drop down menus. All features may not be on a particular user screen:

- *Radio buttons* – Radio buttons appear as black dots to indicate selection. You can toggle the buttons between selected and not selected.
- *Check marks* – Check marks are used to indicate a done or un-done status. You can toggle the marks between checked and unchecked.
- *Drop down menus* – Drop down menus provide the user with a list of possible selections from which to choose. Clicking on a particular selection causes it to be selected and appear in the “window.” You can change a selection by clicking the arrow on the menu box and then clicking on a different item.
- *Text boxes* – Text boxes are empty fields in which you can provide information. At times, this data is requested as additional comments or for supplemental information.
- *Calendar icons* – Calendar icons are provided to make it easier for you to input required dates. Date inputs are specific dates chosen by you to clarify time limits on various PHIMT activities. Choose a date by selecting the arrow in the date window. A calendar icon appears for easy inputs. Click on the desired date or use the arrows near the month and year headings to display a date not currently shown. The date you select will appear in the date window.
- *Action buttons* – Action buttons are used to guide you through the PHIMT steps and processes. Click on these buttons to proceed through various activities. Examples of these buttons include: Next, Save, Create, and Update.

NOTE: These features will be discussed when they are used in an activity.

5.2 PHIMT Error Messages

PHIMT issues error messages when an entry or selection is not appropriate or complete. The message begins “Error(s) have occurred” and then follows with a bulleted list of the errors. For example, if you try to route an activity to someone who does not access to that information, or you are not authorized to route the information to that particular person, PHIMT will display a message that indicating that you do not have the authority to perform that task. If you have not provided information for all the required data fields, PHIMT will issue a message indicating that information is missing. Once the error has been corrected, you can proceed to the next step in the activity.

6.0 USER TAB ACTIVITIES

The User tab provides you with various hyperlinks that allow you to perform desk type duties such as accessing PHIMT user-related information, switching organizations, viewing past requests, and tracking tasks assigned to you. These hyperlinks include:

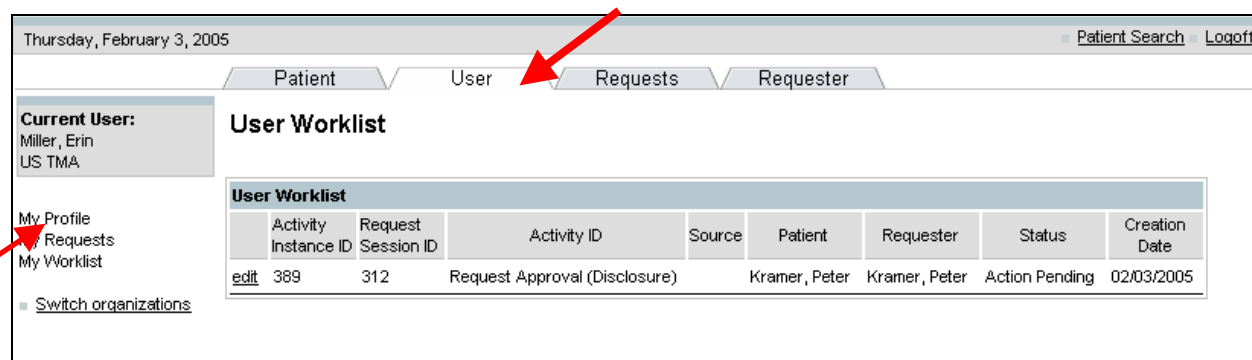
- My profile
- My requests
- My worklist
- Switch organizations

6.1 My Profile

NOTE: The My Profile hyperlink allows you to enter/update personal information and preference data.

To edit your profile:

1. Select the User Tab.
2. Click on the My Profile hyperlink.



Thursday, February 3, 2005 Patient Search Logoff

Patient **User** Requests Requester

Current User:
Miller, Erin
US TMA

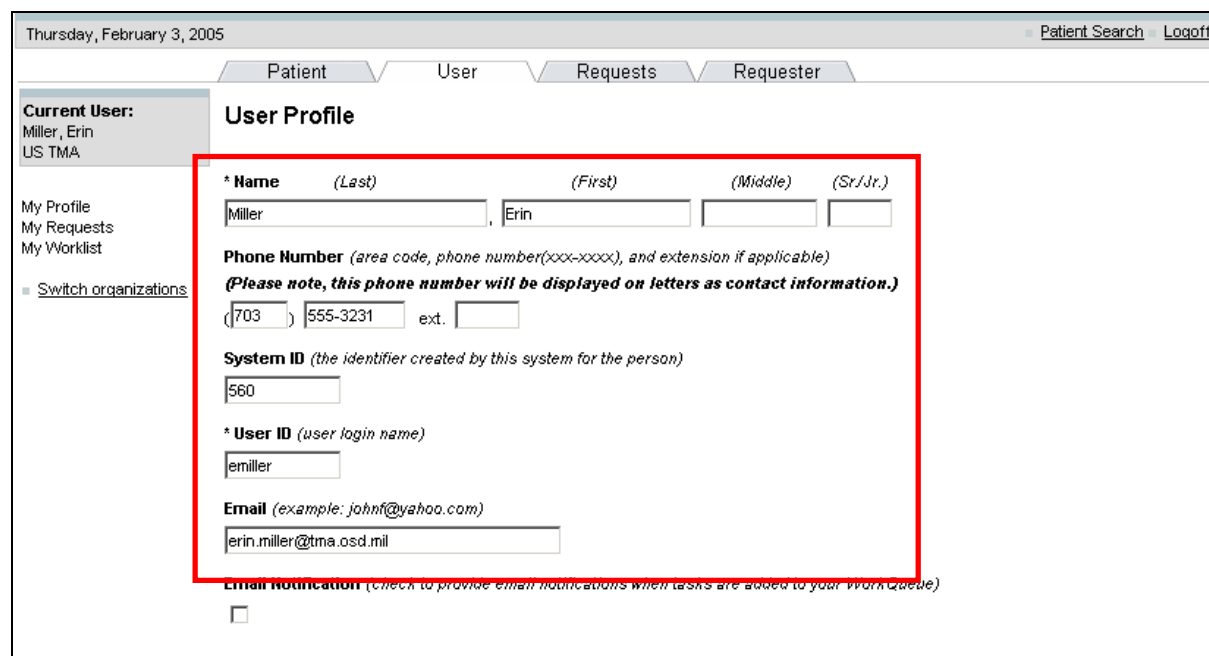
User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
edit 389	312	Request Approval (Disclosure)		Kramer, Peter	Kramer, Peter	Action Pending	02/03/2005

My Profile
My Requests
My Worklist

[Switch organizations](#)

3. Enter your updated information in the information fields.
Note: You may update your name, phone, email, password, signature block (ex. certification titles, educational titles), and add additional comments. You are not authorized to change the system ID or User ID, nor to access User Roles and Use- to-User Relationships.



Thursday, February 3, 2005 Patient Search Logoff

Patient User **Requests** Requester

Current User:
Miller, Erin
US TMA

User Profile

* Name (Last) (First) (Middle) (Sr./Jr.)
Miller Erin

Phone Number (area code, phone number(XXX-XXXX), and extension if applicable)
(Please note, this phone number will be displayed on letters as contact information.)
(703) 555-3231 ext.

System ID (the identifier created by this system for the person)
560

* **User ID** (user login name)
emiller

Email (example: johnf@yahoo.com)
erin.miller@tma.osd.mil

Email Notification (check to provide email notifications when tasks are added to your workQueue)
☐

4. Scroll down to the bottom of the screen.
5. Click on the Update button.

Old Password (User's current password.)

New Password

Confirm New Password

Signature Block (Please note, this text will display in a letter's signature block.)

Comments (general comments about or for the user)

User Roles				
Organization	Privacy Specialist	Regular User	User Admin	Primary
10th MED GROUP-USAF ACADEMY CO	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
US TMA	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

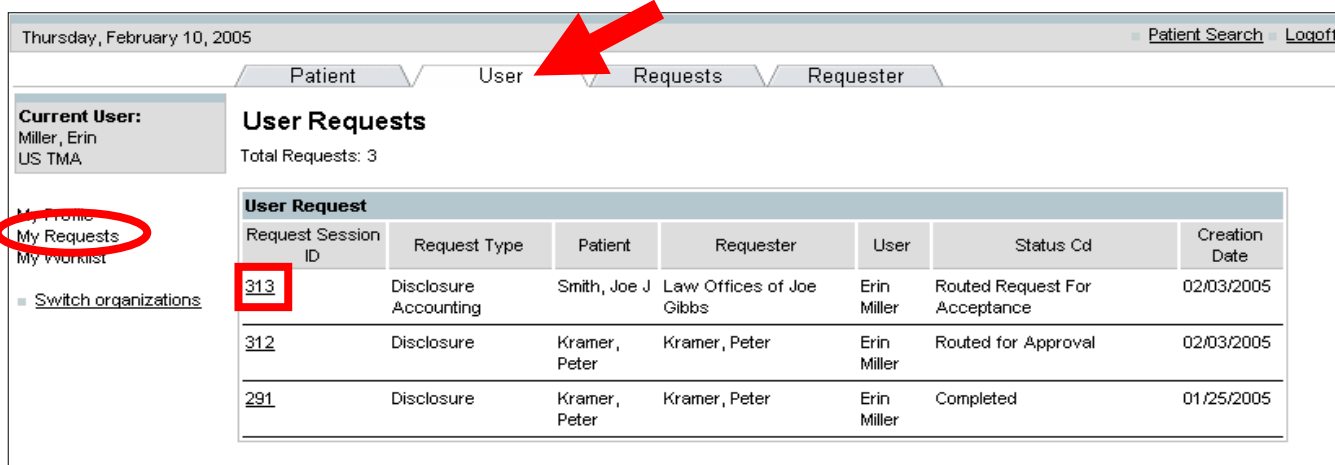
- Your new information will appear in the appropriate fields.

6.2 My Requests

NOTE: The *My Requests* hyperlink allows you to view the status of all requests that you have initiated.

To view your requests:

1. Select the User Tab.
2. Select the My Requests hyperlink.
3. Select the Request Session ID to view a specific request.



Thursday, February 10, 2005 Patient Search Logoff

Patient User **Requests** Requester

Current User:
Miller, Erin
US TMA

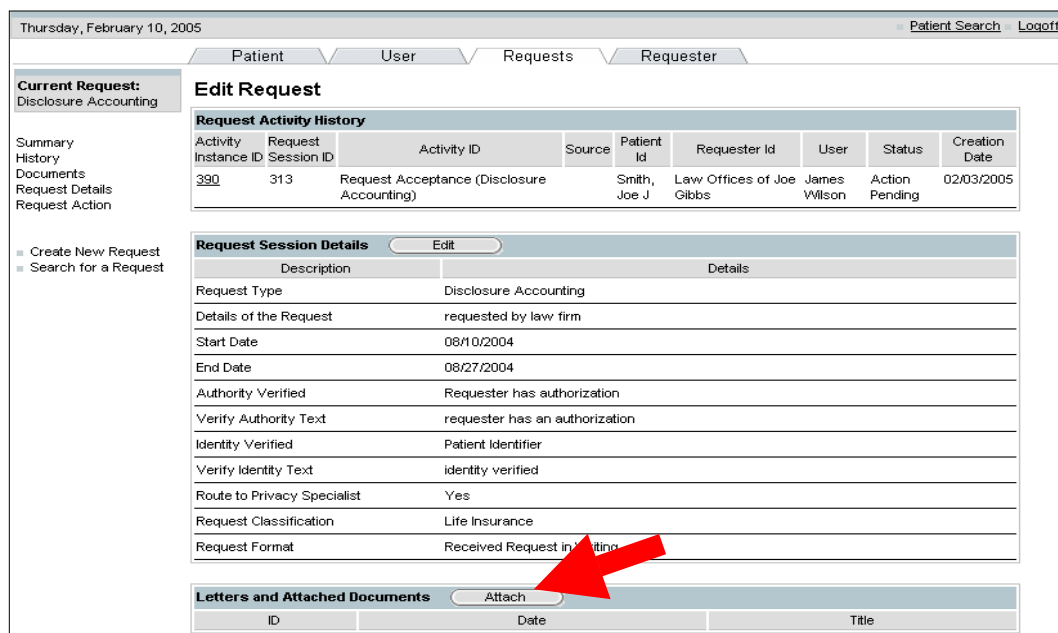
User Requests
Total Requests: 3

My Profile
My Requests
My Worklist
Switch organizations

Request Session ID	Request Type	Patient	Requester	User	Status Cd	Creation Date
313	Disclosure Accounting	Smith, Joe J	Law Offices of Joe Gibbs	Erin Miller	Routed Request For Acceptance	02/03/2005
312	Disclosure	Kramer, Peter	Kramer, Peter	Erin Miller	Routed for Approval	02/03/2005
291	Disclosure	Kramer, Peter	Kramer, Peter	Erin Miller	Completed	01/25/2005

- A detailed summary of that particular request is displayed (as shown below).

***NOTE:** As a Regular User, you are not authorized to edit any information in the summary. However you can attach a document.*



Thursday, February 10, 2005 Patient Search Logoff

Patient User **Requests** Requester

Current Request:
Disclosure Accounting

Summary
History
Documents
Request Details
Request Action

Create New Request
Search for a Request

Edit Request

Request Activity History

Activity Instance ID	Request Session ID	Activity ID	Source	Patient Id	Requester Id	User	Status	Creation Date
390	313	Request Acceptance (Disclosure Accounting)		Smith, Joe J	Law Offices of Joe Gibbs	James Wilson	Action Pending	02/03/2005

Request Session Details Edit

Description	Details
Request Type	Disclosure Accounting
Details of the Request	requested by law firm
Start Date	08/10/2004
End Date	08/27/2004
Authority Verified	Requester has authorization
Verify Authority Text	requester has an authorization
Identity Verified	Patient Identifier
Verify Identity Text	identity verified
Route to Privacy Specialist	Yes
Request Classification	Life Insurance
Request Format	Received Request in writing

Letters and Attached Documents Attach

ID	Date	Title
----	------	-------

To attach a file to your request:

1. Click on the Attach button in the Letters and Attached Documents section.
2. Provide the document information.

3. Click on the Save button.

Thursday, February 10, 2005 Patient Search Logoff

Patient User Requests Requester

Current Request:
Disclosure Accounting

Summary
History
Documents
Request Details
Request Action

■ Create New Request
■ Search for a Request

Attach File
You may attach any document, with file size not exceeding 2M

Document Title (enter this document's title)

Please select a file you wish to attach

6.3 My Worklist

***NOTE:** The My Worklist hyperlink allows you to view all tasks currently assigned to you. This feature serves as an electronic inbox.*

To view tasks on your worklist:

1. Select the User Tab
 2. Select the My Worklist hyperlink.
- The Regular User can view and process all requests that have tasks currently assigned to them.

***NOTE:** To process a request, select that request and perform the action or route it for approval or denial.*

Thursday, February 10, 2005 Patient Search Logoff

Patient User Requests Requester

Current User:
Miller, Erin
US TMA

My Profile
My Requests
My Worklist
Switch organizations

User Worklist

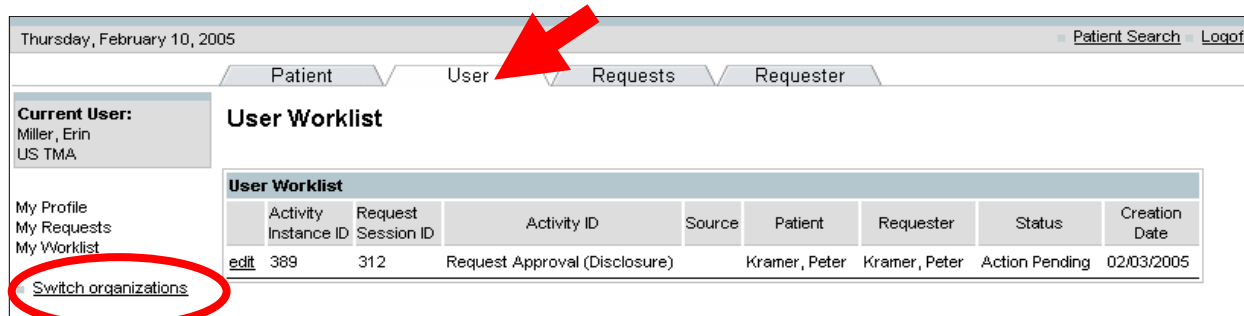
	Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
edit	389	312	Request Approval (Disclosure)		Kramer, Peter	Kramer, Peter	Action Pending	02/03/2005

6.4 Switch Organizations

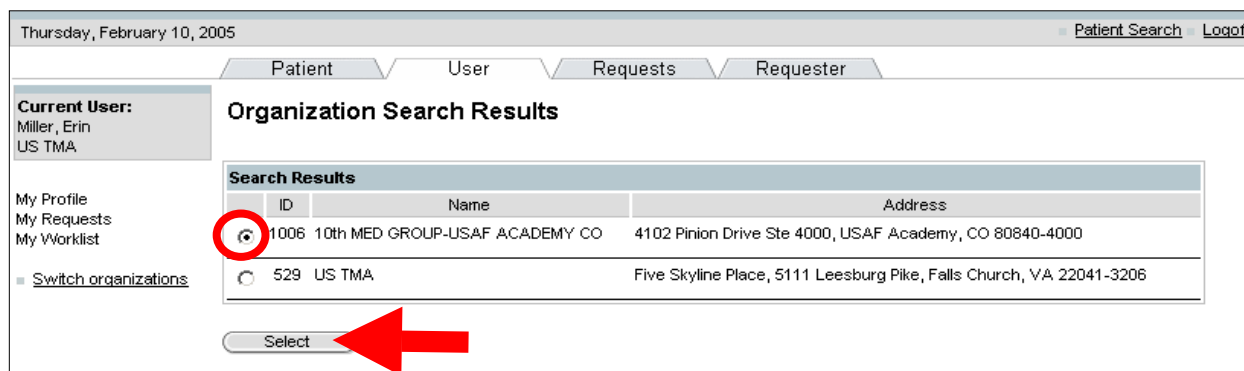
NOTE: The *Switch Organizations* hyperlink allows you to change your primary status between organizations, if you are assigned to more than one organization.

To switch between organizations:

1. Select the User Tab.
2. Select the Switch Organizations hyperlink.



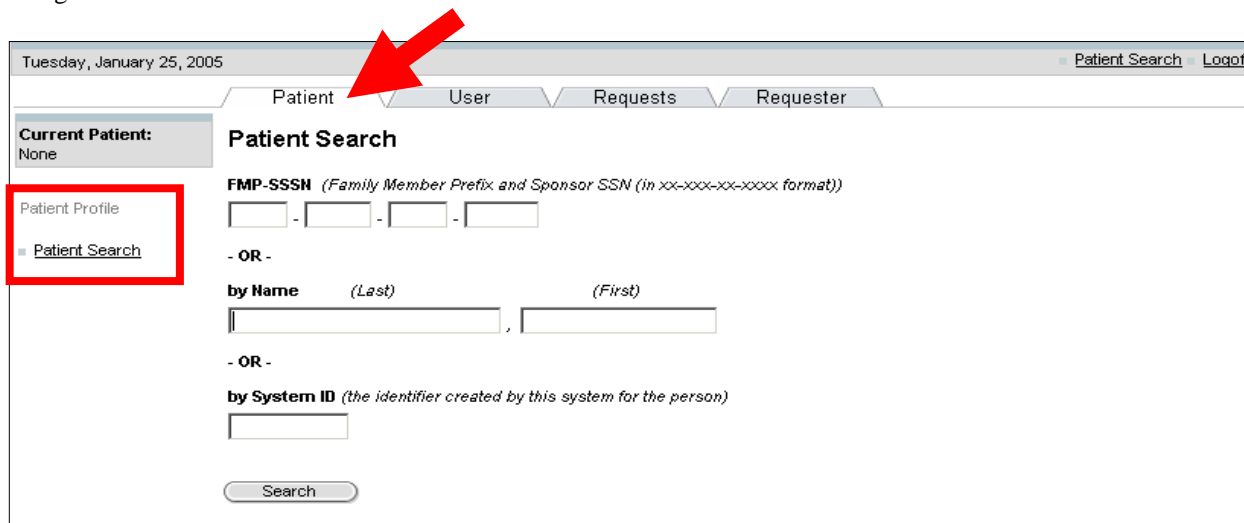
3. Select the new organization.
4. Click on the Select button.



7.0 PATIENT TAB ACTIVITIES

The Patient tab consists of various hyperlinks that allow you to perform patient specific activities such as request an authorization for a patient disclosure, edit a patient profile, and issue an accounting for a disclosure. These hyperlinks include:

- Patient Profile
- Patient search



Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Current Patient:
None

Patient Profile
Patient Search

Patient Search

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))
 - - -

- OR -

by Name (Last) (First)
 ,

- OR -

by System ID (the identifier created by this system for the person)

***NOTE:** To access the PHIMT patient database, you must first select a patient record. All information is accessed by either the patient's FMP-SSSN or by the patient's name.*

We will focus on three patient related activities:

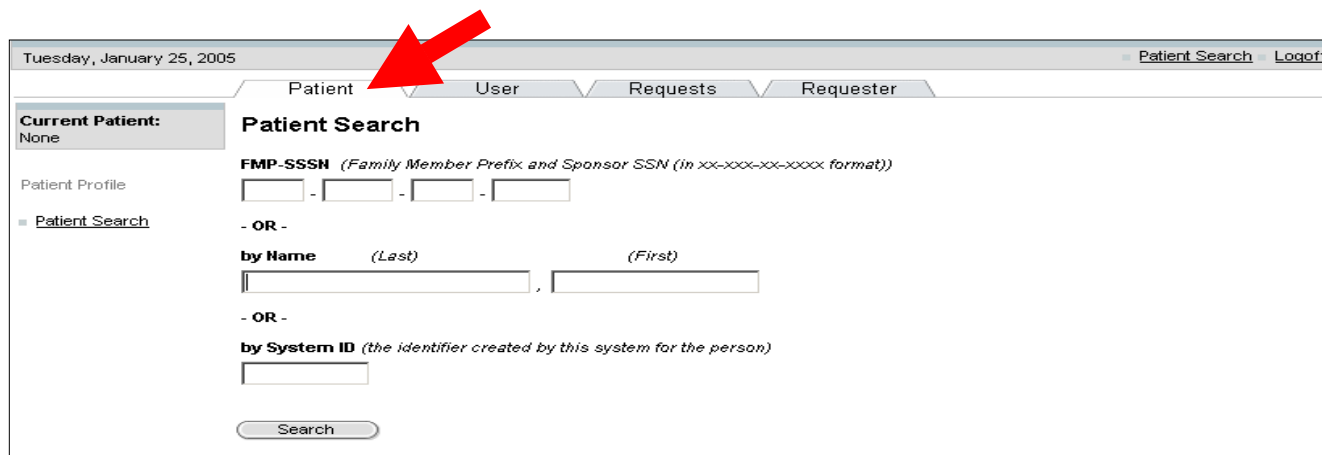
- Patient Search
- Create Patients
- Create an Alternative Phone Number

7.1 Patient Search

***NOTE:** The Patient Search hyperlink allows you to look for a particular patient in the PHIMT database.*

To search for a patient:

1. Select the Patient Tab.



Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Current Patient:
None

Patient Profile
Patient Search

Patient Search

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))
 - - -

- OR -

by Name (Last) (First)
 ,

- OR -

by System ID (the identifier created by this system for the person)

2. Type in the Search Criteria (You can search for a patient by the Family Member Prefix (FMP) Sponsor's SSN or by the patient's name).
3. Click on the Search button.

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Current Patient:
None

Patient Search

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))
20 - 121 - 13 - 1414

- OR -

by Name (Last) (First)
,

- OR -

by System ID (the identifier created by this system for the person)

Search

- The Search Results screen will display.

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Patient Search Results

Search Results for **FMP-SSSN = 1*20-121131414 (sorted by birth date)**

ID	FMP	Name	SSN	Birth Date	Address
29	20	Smith, Joe J	121131414	1968-07-05	188 Midland Pkwy Charleston, SC 29404

FMP-SSSN 20-121131414 (2004-07-20 to 2004-07-20)

Select

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

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Version: 2.24

7.2 ADD A PATIENT RECORD

If a patient does not exist in the PHIMT database, then the user must add a patient record. New patient records cannot be created without first searching the database. The Create a new patient record hyperlink allows you to enter information for a new patient into the PHIMT database.

To add a patient record:

1. Select the Patient Tab.

2. Type in the Search Criteria (You can search for a patient by the Family Member Prefix (FMP) Sponsor's SSN or by the patient's name).
3. Click on the Search button.

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Current Patient:
None

Patient Profile

Patient Search

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))
[] - [] - [] - []

- OR -

by Name (Last) (First)
[Kramer] , [Peter]

- OR -

by System ID (the identifier created by this system for the person)
[]

Search

4. If no results matched your search, select the Create a New Patient Record hyperlink.

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Current Patient:
None

Patient Profile

Patient Search Results

Search Results (sorted by birth date)

ID	Name	SSN	Birth Date	Address
There were no results that matched your search criteria.				

Other options:
Adjust search criteria and try again.
Create a new Patient record.

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Version: 2.24

5. Enter the patient's information: (name, type, SSN, birth date, email, FMP-SSSN).

6. Click on the Save button.

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Current Patient: None

Patient Profile

[Patient Search](#)

Person Details

* Name (Last) (First) (Middle) (Sr/Jr.)
Kramer , Peter

* Type
Patient

SSN (in ###-##-#### format, enter '000-00-0000' if not known)
234 - 12 - 5689

System ID (the identifier created by this system for the person)
0

* Birth Date (birth date in MM/DD/YYYY format)
08 / 11 / 1970

Email (example: johnf@yahoo.com)
kramerp@yahoo.com

FMP-SSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))
30 - 211 - 12 - 8767

Alternate Communication Instructions (special instructions to send correspondence to the person)

Comments (general comments about or for the person)

Save

7. Enter the Address Details (USA or International format).

8. Click on the Save button.

Current Patient: None

Patient Profile

[Patient Search](#)

Address Details

Address Format (APO and FPO address should use USA format)
USA ☒ International ☐

* Address Line 1 (the primary address line)
211 River Road

Address Line 2 (normally a suite or apartment)

* City (city name, or APO or FPO)
Alexandria

* State (two character state identifier: IL, MN, CO, etc., or AA, AE, AP for APO/FPO)
VA

* Postal Code (USA: #####-####)
22454 -

Comments (general comments about or for the address)

Save

Current Patient: None

Patient Profile

[Patient Search](#)

Address Details

Address Format (APO and FPO address should use USA format)
USA ☐ International ☒

Country (country name)
Antigua

International Address Line 1

International Address Line 2

International Address Line 3

Comments (general comments about or for the address)

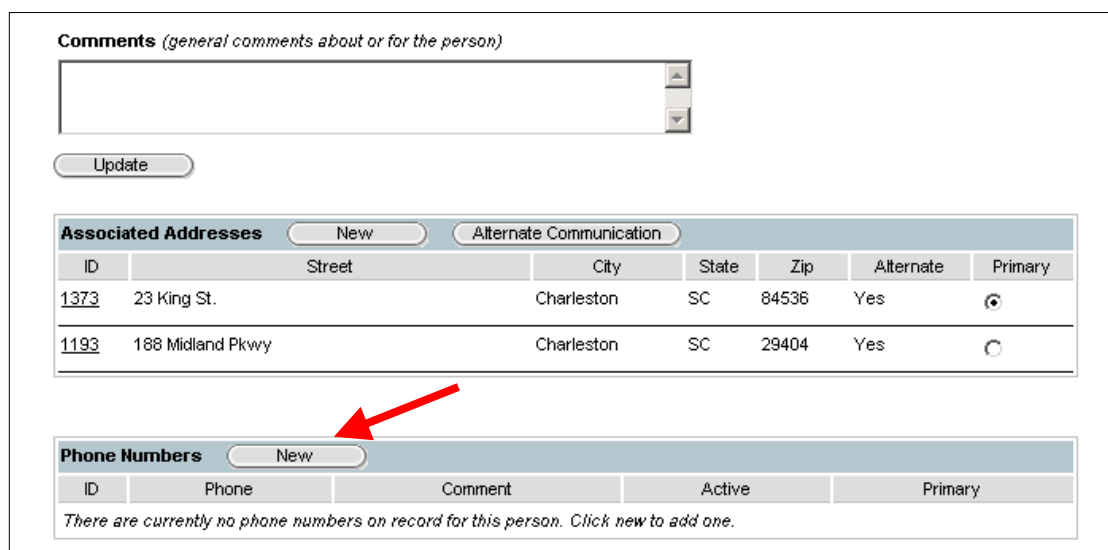
Save

7.3 CREATE AN ALTERNATIVE PHONE NUMBER

Individuals have the right to request an alternative telephone number for receiving communications related to their PHI. An alternative telephone number can be created by Regular Users and Privacy Specialists.

To create an alternative telephone number:

1. Scroll to the bottom of the Patient Details screen.
2. Click on the New button next to Phone Numbers.



Comments (general comments about or for the person)

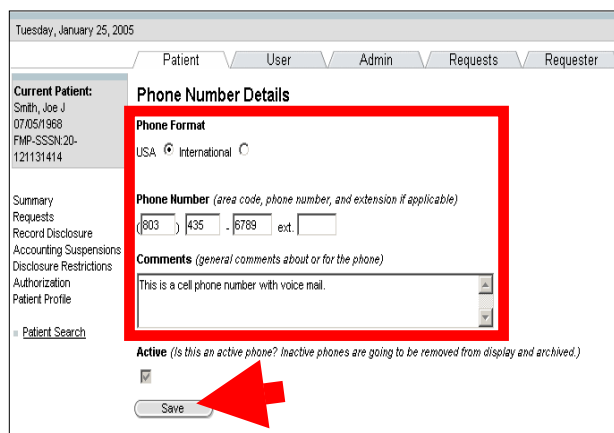
Update

Associated Addresses						
ID	Street	City	State	Zip	Alternate	Primary
1373	23 King St.	Charleston	SC	84536	Yes	<input checked="" type="radio"/>
1193	188 Midland Pkwy	Charleston	SC	29404	Yes	<input type="radio"/>

Phone Numbers

ID	Phone	Comment	Active	Primary
There are currently no phone numbers on record for this person. Click new to add one.				

- The Phone Number Details screen will display (choose the USA or International format).
3. Type in the phone number and enter in any comments.
 4. Click on the Save button.



Tuesday, January 25, 2005

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN-20-121131414

Phone Number Details

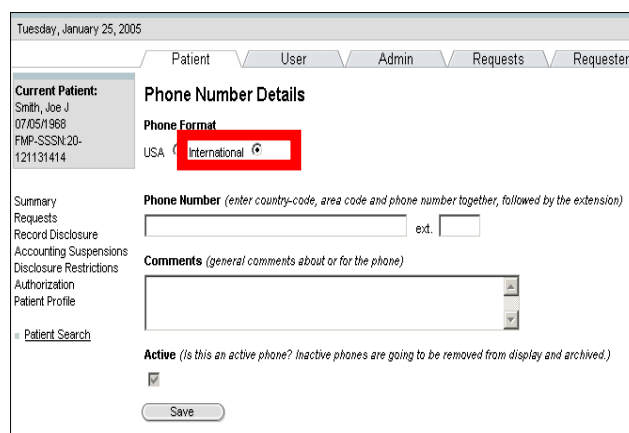
Phone Format
USA ☒ International ☐

Phone Number (area code, phone number, and extension if applicable)
(803) 435 - 6789 ext.

Comments (general comments about or for the phone)
This is a cell phone number with voice mail.

Active (Is this an active phone? Inactive phones are going to be removed from display and archived.)
☒

Save



Tuesday, January 25, 2005

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN-20-121131414

Phone Number Details

Phone Format
USA ☐ International ☒

Phone Number (enter country-code, area code and phone number together, followed by the extension)
 ext.

Comments (general comments about or for the phone)

Active (Is this an active phone? Inactive phones are going to be removed from display and archived.)
☐

Save

- The phone number you added will appear on the Patient Details screen.

Alternate Communication Instructions *(special instructions to send correspondence to the person)*

Send all info to alternate address

Comments *(general comments about or for the person)*

Update

Associated Addresses New Alternate Communication

ID	Street	City	State	Zip	Alternate	Primary
1373	23 King St.	Charleston	SC	84536	Yes	<input checked="" type="radio"/>
1193	188 Midland Pkwy	Charleston	SC	29404	Yes	<input type="radio"/>

Phone Numbers New

ID	Phone	Comment	Active	Primary
483	(803) 435-6789	This is a cell phone number with voice mail.	Yes	<input checked="" type="radio"/>

8.0 REQUESTS TAB ACTIVITIES

The Requests tab allows you to access information about the activities requested by an individual or an organization. Requests tab activities include:

- Record Disclosures Requests
- Record an Accounting of Disclosure Request.

8.1 Record a Disclosure Request

NOTE: The Record Disclosure hyperlink allows you to record or document the release of PHI. This activity consists of five disclosure steps.

Disclosure requests allow you to forward it to a Privacy Specialist for approval or denial. Disclosure status will be set to Pending because as a Regular User, you are not authorized to approve disclosures. Entering the requested action allows you to route the disclosure request to your own worklist for further research or route to a Privacy Specialist.

To record a request for disclosure:

1. Select the Requests Tab.

2. Click on the Disclosure Radio button.

3. Click on the Next button.

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Current Request: None

Create New Request

Select Request Type

☒ Disclosure

☐ Disclosure Accounting

Next

4. Type in the patient search criteria. (You can search for a patient by the patient's FMP-SSSN or by the patient's name).

5. Click on the Search button.

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Current Request: Disclosure

Select Patient Select Requester Request Details Disclosure Details Request Action

1 2 3 4 5

Patient Search

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

30 - 211 - 12 - 8767

- OR -

by Name (Last) (First)

- OR -

by System ID (the identifier created by this system for the person)

Search

6. Select the radio button next to the patient's name.

7. Click on the Select button.

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Current Request: Disclosure

Select Patient Select Requester Request Details Disclosure Details Request Action

1 2 3 4 5

Patient Search Results

Search Results for FMP-SSSN = [*30-211128767] (sorted by birth date)

ID	FMP	Name	SSN	Birth Date	Address
61	30	Kramer, Peter	234125689	1970-08-11	211 River Rd. Alexandria, VA 22454

FMP-SSSN 30-211128767 (2005-01-25 to 2005-01-25)

Select

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

8. Select the Requester. (The Requester Search screen will appear).
9. Complete the information fields to search by patient, third party organization, person, or organization. (Only complete one field).
10. Select OK, Select, or Search (for that field)
Example: If the request is being made by the patient themselves, click on the Search button next to the patient's name.

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Current Request: Disclosure

Select Patient Select Requester Request Details Disclosure Details Request Action

1 2 3 4 5

Create New Request
Search for a Request

Requester Search

Choose one of the following options:

A. Select the Patient (the request is being made by the Patient themselves)

Kramer, Peter Select

B. Select a Third-Party Organization (a third-party requester, such as a law enforcement agency or insurance company)

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA, 20220 Select

C. Search for a Person (search for another person, or add a new one*)

Name (Last) (First) An "*" may be used as a wildcard.

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records
☒ Include Non-Patient Records

Search

D. Search for an Organization (search for another organization, or add a new one*)

11. Confirm Requester and Recipient Details. Verify and/or complete the information fields.
12. Click on the Next button.

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Current Request: Disclosure

Select Patient Select Requester Request Details Disclosure Details Request Action

1 2 3 4 5

Create New Request
Search for a Request

Confirm Requester and Recipient Details

Patient: Peter Kramer
Date of Birth: 1970-08-11
SSN: 234125689
Address: 211 River Rd., Alexandria, VA 22454

Requester: Peter Kramer [change](#)
Address: 211 River Rd., Alexandria, VA 22454 [Add New](#)

Recipient: Same as requester
[set a different recipient](#)

Back Next

13. Enter in the Request Details: (details of the request, identity verification, and authority verification).

Tuesday, January 25, 2005 Patient Search Logout

Patient User Requests Requester

Current Request: Disclosure

Select Patient Select Requester Request Details Disclosure Details Request Action

1 2 3 4 5

Create New Request
Search for a Request

Request Details

Details of the Request (requester's comments, or instructions about this request)

* Requester Identity Verified (was the requester's identity verified?)
Patient Identifier

Description of Requester Identity Verification (if the requester's identity was verified, how was it verified?)
license

* Requester Authority Verified (was the requester's authority to access information verified?)
Patient is Requester

Description of Requester Authority Verification (if the requester's authority was verified, how was it verified?)
Patient is requester

Information Start Date (the start date for the information in MM/DD/YYYY format)
01/25/2005

14. Scroll down the screen and enter: (Information start and end date, request format, and request classification).

15. Click on the Next button.

* Requester Identity Verified (was the requester's identity verified?)
Patient Identifier

Description of Requester Identity Verification (if the requester's identity was verified, how was it verified?)
license

* Requester Authority Verified (was the requester's authority to access information verified?)
Patient is Requester

Description of Requester Authority Verification (if the requester's authority was verified, how was it verified?)
Patient is requester

Information Start Date (the start date for the information in MM/DD/YYYY format)
01/25/2005

Information End Date (the end date for the information in MM/DD/YYYY format)
02/25/2005

Request Format (the format in which this request has been received)
Received Request in Writing

Request Classification (an optional classification for this request)
Medical

Back Next

16. Enter in the Disclosure Details: (Disclosure type, status, disclosure date, treatment start and end date, origin organization, disclosure purpose).

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

Select Patient Select Requester Request Details **Disclosure Details** Request Action

1 2 3 4 5

Current Request:
Disclosure

Create New Request
Search for a Request

Disclosure Details

Disclosure Type (the type of disclosure)
Law Enforcement Purposes

Disclosure Status (the status of the disclosure)
Pending

Disclosure Date (the disclosure date in MM/DD/YYYY format)
01/25/2005

Treatment Start Date (the service start date in MM/DD/YYYY format)
12/07/2004

Treatment End Date (the service end date in MM/DD/YYYY format)
01/15/2005

Origin Organization (where the disclosure originated)
US TMA

Disclosure Purpose (the purpose of the disclosure)
Law Enforcement

17. Scroll down the screen and enter: (PHI description and disclosure comments).

18. Click on the Next button.

Disclosure Purpose (the purpose of the disclosure)
Law Enforcement
Other:

Protected Health Information Description (the description of the Protected Health Information disclosed)

☒ Complete Health Record(s)
☐ Consultation Report(s)
☐ Discharge Summary
☐ History and Physical Examination
☐ Laboratory Test(s)
☐ Operative Report(s)
☐ Pathology Report(s)
☐ Progress Notes
Other:

Disclosure Comments (the INTERNAL comments for this disclosure - these do NOT show up in the Protected Health Information disclosure report)

Back Next

19. Enter in the Request Action Details.

20. From the Action drop-down box, select the appropriate routing option (Privacy Specialist).

21. Click on the Save button.

Current Request: Disclosure

Request Action

Patient
Name: Peter Kramer
SSN #: 234125689
Birth Date: 08-11-1970
Address: 211 River Rd., Alexandria, VA 22454

Requester/Recipient
Name: Peter Kramer
Address: 211 River Rd., Alexandria, VA 22454

Details of the Request (requester's comments about the scope of this request)

Approved Part (for partially approved requests, describe part of request that was approved)

Denied Part (for partially denied requests, describe part of request that was denied)

Action (action for this request)
 Route to Privacy Specialist

Back **Save**

- The Disclosure Request Summary will display.

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

Current Request: Disclosure

Request Summary

Patient
Name: Peter Kramer
SSN #: 234125689
Birth Date: 08-11-1970
Address: 211 River Rd., Alexandria, VA 22454

Requester/Recipient
Name: Peter Kramer
Address: 211 River Rd., Alexandria, VA 22454

Request Status: Routed for Approval
Request Creation Date: 01/25/2005 at 04:06:05 PM EST
Request Last Update Date: 01/25/2005 at 04:06:06 PM EST

Other Request Details	
Description	Details
Request Type	Disclosure
Details of the Request	
Disclosure Type	Type: Law Enforcement Purposes, ID: 268, Date: 01/25/2005
Start Date	01/25/2005
End Date	02/25/2005
PHI Items	Complete Health Record(s)
Authority Verified	Patient is Requester

8.1.1 UPDATE PATIENT ADDRESS

For a disclosure to be valid, a patient's address must be entered. The Regular User can update the patient's address in the middle of a disclosure request.

To update the patient's address:

1. Select the Request Tab.
2. Select the Disclosure radio button.
3. Click on the Next button.

Monday, January 24, 2005 Patient Search Logoff

Patient User **Requests** Requester

Current Request: None

Create New Request

Select Request Type

☒ Disclosure
☐ Disclosure Accounting

Next

4. Type in the patient search criteria. (You can search for a patient by the patient's FMP-SSSN or by the patient's name).
5. Click on the Search button.

Monday, January 24, 2005 Patient Search Logoff

Patient User Requests **Requester**

Current Request: Disclosure

Select Patient **Select Requester** **Request Details** **Disclosure Details** **Request Action**

1 2 3 4 5

Patient Search

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

01 - 211 - 12 - 5994

- OR -

by Name (Last) (First)

,

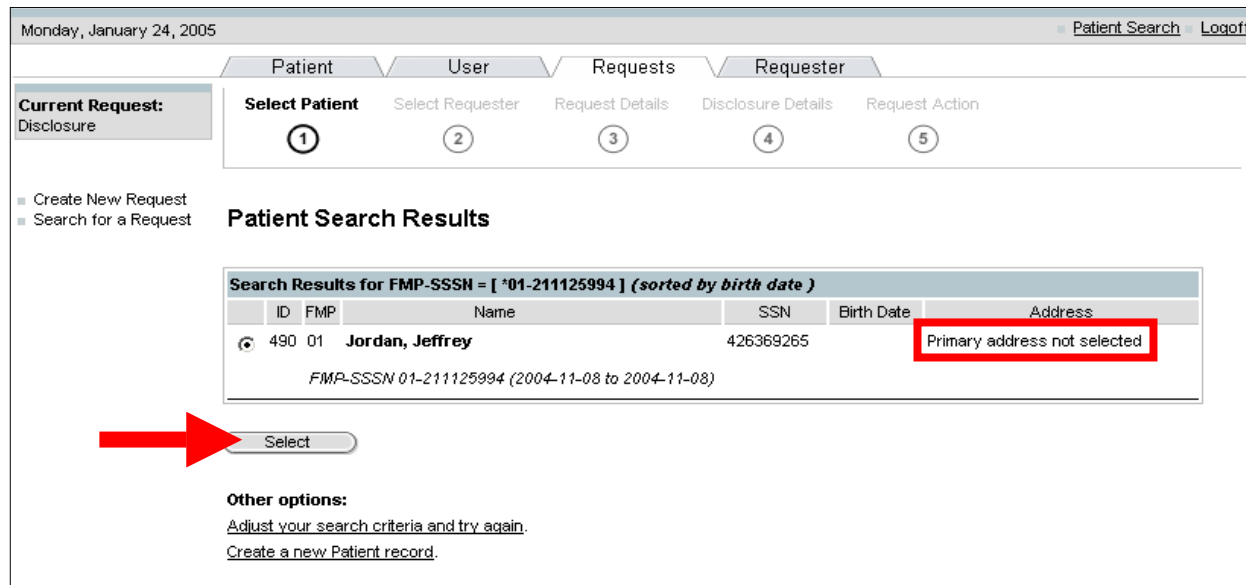
- OR -

by System ID (the identifier created by this system for the person)

Search

- If the patient does not have an address entered in the tool, “Primary Address not selected” will be listed next to the patient’s name.

6. Select the patient.



Monday, January 24, 2005 Patient Search Logoff

Patient User Requests Requester

Current Request: Disclosure

Select Patient (1) Select Requester (2) Request Details (3) Disclosure Details (4) Request Action (5)

Create New Request
Search for a Request

Patient Search Results

Search Results for FMP-SSN = ['01-211125994] (sorted by birth date)

ID	FMP	Name	SSN	Birth Date	Address
490	01	Jordan, Jeffrey	426369265		Primary address not selected

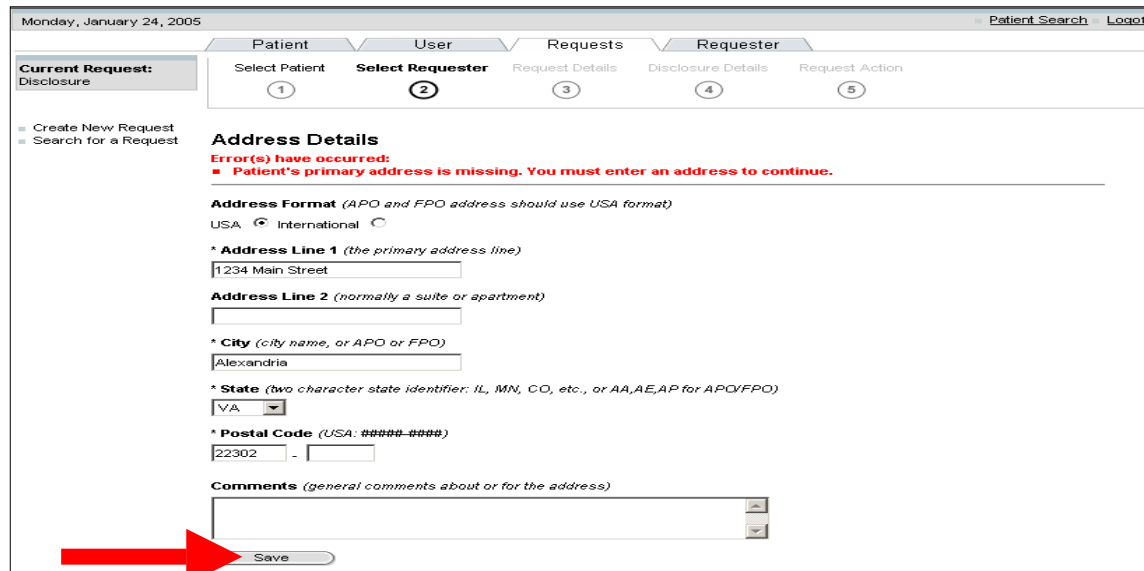
FMP-SSN 01-211125994 (2004-11-08 to 2004-11-08)

Select

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

7. Type in the patient’s address.

8. Click on the Save button.



Monday, January 24, 2005 Patient Search Logoff

Patient User Requests Requester

Current Request: Disclosure

Select Patient (1) Select Requester (2) Request Details (3) Disclosure Details (4) Request Action (5)

Create New Request
Search for a Request

Address Details

Error(s) have occurred:
 ■ Patient's primary address is missing. You must enter an address to continue.

Address Format (APO and FPO address should use USA format)
 USA ☒ International ☐

* Address Line 1 (the primary address line)
 1234 Main Street

Address Line 2 (normally a suite or apartment)

* City (city name, or APO or FPO)
 Alexandria

* State (two character state identifier: IL, MN, CO, etc., or AA, AE, AP for APO/FPO)
 VA

* Postal Code (USA: #####-####)
 22302 -

Comments (general comments about or for the address)

Save

- After saving the address, you can continue with the Disclosure Request where you left off.

Monday, January 24, 2005 Patient Search Logoff

Patient User **Requests** Requester

Current Request: Disclosure

Select Patient **Select Requester** Request Details Disclosure Details Request Action

1 2 3 4 5

Create New Request
Search for a Request

Requester Search

Choose one of the following options:

A. Select the Patient (the request is being made by the Patient themselves)

Jordan, Jeffrey Select

B. Select a Third-Party Organization (a third-party requester, such as a law enforcement agency or insurance company)

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220 Select

C. Search for a Person (search for another person, or add a new one*)

Name (Last) (First) An * may be used as a wildcard.

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records
☒ Include Non-Patient Records

Search

8.2 Record An Accounting of Disclosures Request

NOTE: The *Disclosure Accounting* hyperlink allows you to process a justification for a disclosure. This activity consists of four accounting of disclosure steps.

A Patient may ask for an accounting of disclosures at any time. PHIMT allows for a quick reporting of this information.

NOTE: *Request Action* allows you to route the request to your Privacy Specialist for approval or denial or to your own worklist if you need to research it further.

To record a request for an accounting of disclosures:

1. Select the Requests Tab.
2. Select the Create New Request hyperlink.
3. Click on the radio button for Disclosure Accounting.

4. Click on the Next button.

Friday, February 11, 2005 [Patient Search](#) [Logout](#)

Patient User Requests Requester

Current Request:
None

Create New Request

Select Request Type

☐ Disclosure

☒ Disclosure Accounting

[Create New Request](#)

[Search for a Request](#)

[Next](#)

5. Search for the patient.

6. Click on the Search button.

Friday, February 11, 2005 [Patient Search](#) [Logout](#)

Patient User Requests Requester

Current Request:
Disclosure Accounting

Select Patient **Select Requester** **Request Details** **Request Action**

① ② ③ ④

Patient Search

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

20 - 121 - 13 - 1414

- OR -

by Name (Last) (First)

,

- OR -

by System ID (the identifier created by this system for the person)

[Search](#)

7. Select the patient from the patient search results screen.

Friday, February 11, 2005 [Patient Search](#) [Logout](#)

Patient User Requests Requester

Current Request:
Disclosure Accounting

Select Patient **Select Requester** **Request Details** **Request Action**

① ② ③ ④

Patient Search Results

Search Results for FMP-SSSN = ['20-121131414'] (sorted by birth date)

ID	FMP	Name	SSN	Birth Date	Address
292	20	Smith, Joe J	121131414	1968-07-05	23 King St. Charleston, SC 84536

FMP-SSSN 20-121131414 (2004-07-20 to 2004-07-20)

[Select](#)

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

8. Select the current patient or organization displayed, OR complete the information fields to search by patient, third party organization, person, or organization. Only complete one field. (For instructional purposes, we will select the patient).
9. Select OK, Select, or Search (for that field).

Friday, February 11, 2005 Patient Search Logoff

Current Request: Disclosure Accounting

Navigation: Patient (1) **User (2)** Requests (3) Requester (4)

Requester Search

Choose one of the following options:

A. Select the Patient (the request is being made by the Patient themselves)

Smith, Joe J Select

B. Select a Third-Party Organization (a third-party requester, such as a law enforcement agency or insurance company)

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220 Select

C. Search for a Person (search for another person, or add a new one*)

Name (Last) (First) An "*" may be used as a wildcard.

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records
☒ Include Non-Patient Records

Search

D. Search for an Organization (search for another organization, or add a new one*)

Name (All or part of the name of the organization. An "*" may be used as a wildcard.)

10. Confirm the requester and recipient details. Verify that the information is correct and/or complete the information fields. (If changes are necessary, select Back, and make the changes).
11. Click on the Next button.

Friday, February 11, 2005 Patient Search Logoff

Current Request: Disclosure Accounting

Navigation: Patient (1) **User (2)** Requests (3) Requester (4)

Confirm Requester and Recipient Details

Patient: Joe J Smith
Date of Birth: 1968-07-05
SSN: 121131414
Address: 23 King St., Charleston, SC 84536

Requester: Joe J Smith [change](#)
Address: 23 King St., Charleston, SC 84536 [Add New](#)

Recipient: Same as requester
[set a different recipient](#)

Back Next

12. Enter the Request Details: (details of the request, identity verification, authority verification).

13. Scroll down the screen and enter: (Information start and end date, request format, and request classification).

14. Click on the Next button.

15. Enter in the Request Action details.

16. From the Action drop-down box, select the appropriate person to route the request to. (The Regular User would route the request to the Privacy Specialist or to their worklist).

17. Click on the Save button.

Friday, February 11, 2005 Patient Search Logoff

Patient User Requests Requester

Current Request: Disclosure Accounting

1 2 3 4

■ Create New Request
■ Search for a Request

Request Action

Patient
Name: Joe Smith
SSN #: 121131414
Birth Date: 07-05-1968
Address: 23 King St., Charleston, SC 84536

Requester/Recipient
Name: Joe J Smith
Address: 23 King St., Charleston, SC 84536

Details of the Request (requester's comments about the scope of this request)
 Patient is requesting an accounting of disclosures.

Approved Part (for partially approved requests, describe part of request that was approved)

Denied Part (for partially denied requests, describe part of request that was denied)

Action (action for this request)
 Route to Privacy Specialist

Back Save

- The Request Summary screen will display.

NOTE: The current disclosure accounting, appears in the status box.

Friday, February 11, 2005 Patient Search Logoff

Patient User Requests Requester

Current Request: Disclosure Accounting

Request Summary

Patient
Name: Joe J Smith
SSN #: 121131414
Birth Date: 07-05-1968
Address: 23 King St., Charleston, SC 84536

Requester/Recipient
Name: Joe J Smith
Address: 23 King St., Charleston, SC 84536

Request Status: Routed Request For Acceptance
Request Creation Date: 02/11/2005 at 01:05:04 PM EST
Request Last Update Date: 02/11/2005 at 01:05:06 PM EST

Other Request Details	
Description	Details
Request Type	Disclosure Accounting
Details of the Request	Patient is requesting an accounting of disclosures.
Start Date	12/15/2004
End Date	01/20/2005
Authority Verified	Patient is Requester
Verify Authority Text	Patient is requester.

9.0 REQUESTER TAB ACTIVITIES

The Requester tab (shown below) provides access to all PHIMT Requester data and allows you to access information about the individual or organization making the disclosure request. You must first identify an organization or individual as the requester. This can be accomplished on the Requester Search screen. The hyperlinks become active, on the Requester Summary screen, once a requester has been designated. Access to requester data is provided by these hyperlinks:

- Requester Summary
- Requester Requests
- Requester Profile
- Requester Search

Friday, February 11, 2005 Patient Search Logoff

Patient User Requests **Requester**

Current Requester:
None

Requester Search

Choose one of the following options:

A. Select the Patient (the request is being made by the Patient themselves)

Smith, Joe J

B. Select a Third-Party Organization (a third-party requester, such as a law enforcement agency or insurance company)

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220

C. Search for a Person (search for another person, or add a new one*)

Name (Last) (First) An "*" may be used as a wildcard.

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records
☒ Include Non-Patient Records

D. Search for an Organization (search for another organization, or add a new one*)

9.1 Requester Search

NOTE: The Requester Search hyperlink allows you to search for a particular requester. (You are searching for a patient in the database).

To search for a particular requester:

1. Select the Requester Tab.
2. Select the Requester Search hyperlink.
3. Enter the person's name for the search.
4. Click on the Search button.

Friday, February 11, 2005 Patient Search Logoff

Patient User Requests Requester

Current Requester: None

Requester Summary
Requester Requests
Requester Profile

■ Requester Search

Requester Search

Choose one of the following options:

A. Select a Third-Party Organization (a third-party requester, such as a law enforcement agency or insurance company)

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220 Select

B. Search for a Person (search for another person, or add a new one*)

Name (Last) (First) An * may be used as a wildcard.
Thomas , Fred

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records
☒ Include Non-Patient Records

Search

C. Search for an Organization (search for another organization, or add a new one*)

Name (All or part of the name of the organization. An * may be used as a wildcard.)

DMIS Code (the external identifier for the organization)

Search

5. Select the patient from the Requester Search Results screen.

6. Click on the Select button.

Friday, February 11, 2005 Patient Search Logoff

Patient User Requests Requester

Current Requester: Thomas, Fred Sr

Requester Summary
Requester Requests
Requester Profile

■ Requester Search

Requester Search Results

Search Results

ID	Name	Address
60	Thomas, Fred Sr	Box 131, Alma, KS 66401-1000

Select

Other options:
[Adjust your search criteria and try again.](#)
[Create a new requester as a person.](#)

- The Requester Summary screen will display. The Regular User can display reports and/or letters or access another hyperlink.

Friday, February 11, 2005 Patient Search Logoff

Patient User Requests Requester

Current Requester: Thomas, Fred Sr

Requester Summary
Requester Requests
Requester Profile

■ Requester Search

Requester Summary

Summary Item Filters Display

☒ Reports ☒ Letters

9.2 Requester Requests

NOTE: *The Requester Requests screen displays the status of all requests that were generated by a particular patient or organization.*

To view the status of requests:

1. Select the Requester Tab.
2. Select the Requester Search hyperlink.
3. Enter the person's name for the search.
4. Click on the Search button.
5. Select the patient from the Requester Search Results screen.
6. Click on the Select button.
7. The Requester Summary screen will display

NOTE: *Steps 1-7 for Requester Requests are the same as those for Requester Search, 9.1. Refer to steps 1-7 in 9.1 for screen display information.*

8. Select the Requester Requests hyperlink.

Friday, February 11, 2005 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

Current Requester:
Thomas, Fred Sr

Requester Summary

Requester Summary
Requester Requests
Requester Profile
Requester Search

Summary Item Filters [Display](#)

☒ Reports ☒ Letters

- The Requester Requests screen will display. All requests for that particular patient or organization and the status of those requests will be displayed. (Regular Users can view the status of a disclosure; however, they cannot view the details of the disclosure. They do not have access to the Request Session ID).

Friday, February 11, 2005 Patient Search Logoff

Patient User Requests Requester

Current Requester:
Thomas, Fred Sr

Requester Requests
Total Requests: 19

Requester Summary
Requester Requests
Requester Profile
[Requester Search](#)

Request Session ID	Request Type	Patient	Requester	User	Status Cd	Creation Date
	Disclosure Accounting	Thomas, Fred Sr	Thomas, Fred Sr	Pradeep Thaivalappil	Request was Accepted	01/25/2005
	Disclosure Accounting	Thomas, Fred Sr	Thomas, Fred Sr	Pradeep Thaivalappil	Request was Accepted	01/25/2005
	Disclosure Accounting	Thomas, Fred Sr	Thomas, Fred Sr	Pradeep Thaivalappil	Request was Accepted	01/25/2005
	Disclosure Accounting	Thomas, Fred Sr	Thomas, Fred Sr	Pradeep Thaivalappil	Request was Accepted	10/20/2004
	Disclosure Accounting	Test, Pradeep	Thomas, Fred Sr	Pradeep Thaivalappil	Completed	10/20/2004
	Disclosure Accounting	Thomas, Fred Sr	Thomas, Fred Sr	Pradeep Thaivalappil	Completed	10/20/2004
	Disclosure Accounting	Thomas, Fred Sr	Thomas, Fred Sr	Pradeep Thaivalappil	Routed Request For Acceptance	10/19/2004

9.3 Requester Profile

NOTE: The Requester Profile hyperlink allows you to view information about the individual or organization making the request.

To edit the requester's profile:

1. Select the Requester Tab.
2. Select the Requester Search hyperlink.
3. Enter the person's name for the search.
4. Click on the Search button.
5. Select the patient from the Requester Search Results screen.
6. Click on the Select button.
7. The Requester Summary screen will display

NOTE: Steps 1-7 for Requester Profile are the same as those for Requester Search, 9.1. Refer to steps 1-7 in 9.1 for screen display information.

8. Select the Requester Profile hyperlink.

Friday, February 11, 2005 Patient Search Logoff

Patient User Requests Requester

Current Requester:
Thomas, Fred Sr

Requester Summary

Requester Summary
Requester Requests
Requester Profile
Requester Search

Summary Item Filters Display

☐ Reports ☐ Letters

9. Enter the required information: name, requester type, social security number, birth date of the requester, and the FMP-SSSN. Use drop down menus where applicable. (The following fields are optional: email, alternate communication, comments, associated addresses, and phone numbers).

10. Click on the Update button.

Friday, February 11, 2005 Patient Search Logoff

Patient User Requests Requester

Current Requester:
Thomas, Fred Sr

Requester Profile - Person Details

*** Name** (Last) (First) (Middle) (Sr./Jr.)
Thomas , Fred

*** Type**
Patient

*** SSN** (in ###-##-#### format, enter '000-00-0000' if not known)
111 - 11 - 1111

System ID (the identifier created by this system for the person)
60

*** Birth Date** (birth date in MM/DD/YYYY format)
05 / 05 / 1955

Email (example: johnf@yahoo.com)
rthomas@krystal.com

*** FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))
10 - 121 - 13 - 1413

Alternate Communication Instructions (special instructions to send correspondence to the person)

Comments (general comments about or for the person)

Update

9.4 Requester Summary

NOTE: The Requester Summary hyperlink allows you to display all the letters and reports that were requested.

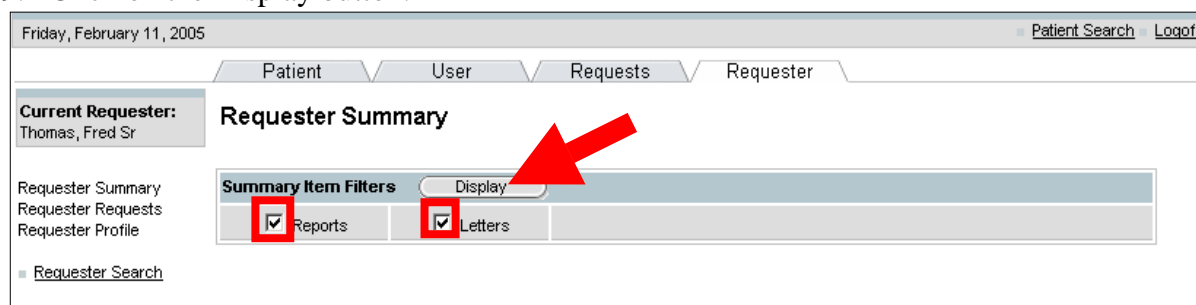
To view a summary of all disclosure letters and reports:

1. Select the Requester Tab.
2. Select the Requester Search hyperlink.

3. Enter the person's name for the search.
4. Click on the Search button.
5. Select the patient from the Requester Search Results screen.
6. Click on the Select button.
7. The Requester Summary screen will display

NOTE: Steps 1-7 for Requester Profile are the same as those for Requester Search, 9.1. Refer to steps 1-7 in 9.1 for screen display information.

8. Select Letters or Reports (or both) by placing a check in the checkboxes.
9. Click on the Display button.



Friday, February 11, 2005 Patient Search Logoff

Patient User Requests Requester

Current Requester:
Thomas, Fred Sr

Requester Summary

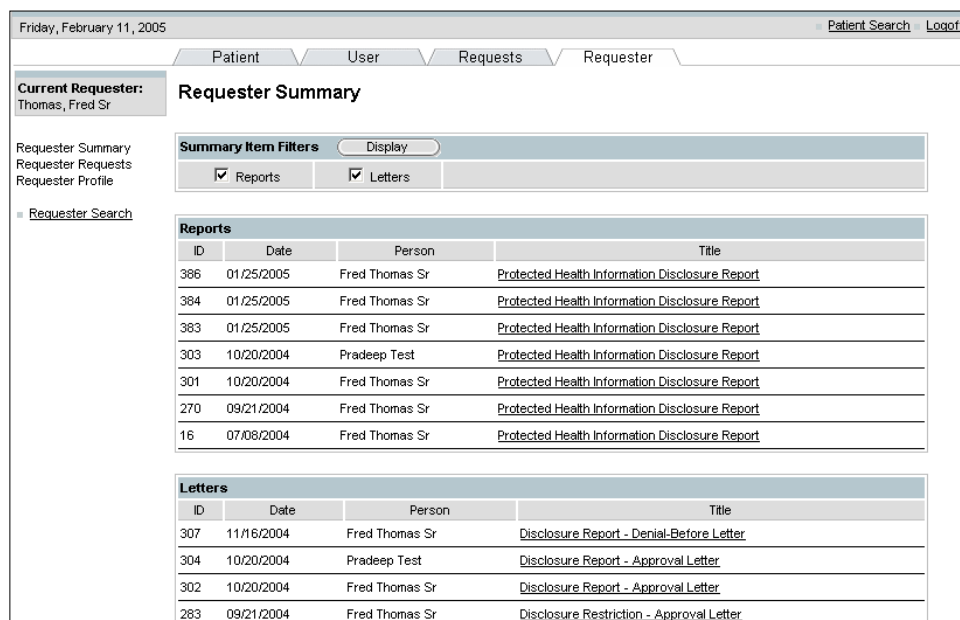
Requester Summary
Requester Requests
Requester Profile

Summary Item Filters Display

☒ Reports ☒ Letters

[Requester Search](#)

- A summary of all letters and reports of disclosures made by that requester will be displayed.



Friday, February 11, 2005 Patient Search Logoff

Patient User Requests Requester

Current Requester:
Thomas, Fred Sr

Requester Summary

Requester Summary
Requester Requests
Requester Profile

Summary Item Filters Display

☒ Reports ☒ Letters

Reports

ID	Date	Person	Title
386	01/25/2005	Fred Thomas Sr	Protected Health Information Disclosure Report
384	01/25/2005	Fred Thomas Sr	Protected Health Information Disclosure Report
383	01/25/2005	Fred Thomas Sr	Protected Health Information Disclosure Report
303	10/20/2004	Pradeep Test	Protected Health Information Disclosure Report
301	10/20/2004	Fred Thomas Sr	Protected Health Information Disclosure Report
270	09/21/2004	Fred Thomas Sr	Protected Health Information Disclosure Report
16	07/08/2004	Fred Thomas Sr	Protected Health Information Disclosure Report

Letters

ID	Date	Person	Title
307	11/16/2004	Fred Thomas Sr	Disclosure Report - Denial-Before Letter
304	10/20/2004	Pradeep Test	Disclosure Report - Approval Letter
302	10/20/2004	Fred Thomas Sr	Disclosure Report - Approval Letter
283	09/21/2004	Fred Thomas Sr	Disclosure Restriction - Approval Letter

[Requester Search](#)

10.0 REGULAR USER GLOSSARY

To facilitate clarity the following terms will be used throughout the document and are defined as follows:

Action: Action is a PHIMT term for a specific activity that requires a response to a request.

Attach: Attach is a PHIMT option that allows the user to send documentation or files with a disclosure.

Authorization: Authorization is a hyperlink on the Patient tab that allows the user to process an approval for a disclosure.

Back: Back is a navigation button that allows the regular user to return to the previous screen.

Create: Create is a PHIMT option that allows the regular user to initiate a new activity.

Create new request: Create new request is a hyperlink on the Requests tab that allows the regular user to initiate a request for a new disclosure activity.

Disclosure: Disclosure is a hyperlink on the Requests tab that allows the regular user to forward a release of protected health information to the Privacy Specialist.

Disclosure Accounting: Disclosure accounting is a hyperlink on the Requests tab that allows the regular user to process a justification for a disclosure.

Disclosure Details: Disclosure details is a PHIMT term that refers to information about a specific release that the regular user can view on the patient summary screen.

Display: Display is a PHIMT option that allows the regular user to view various types of information about a particular patient or disclosure activity.

Generate Form: Generate form is a hyperlink on the Patient tab, that allows the regular user to create forms and letters for various disclosure activities and situations.

Logoff: Logoff is a hyperlink that allows the regular user to exit PHIMT.

Login: Login is the PHIMT opening screen that requires a User ID and password.

MTF: MTF is a PHIMT acronym for Military Treatment Facility.

My Profile: My Profile is a hyperlink on the User tab that allows the regular user to enter/update personal information and preference data.

My Requests: My Requests is a hyperlink on the User tab that allows regular users to view the status of all requests initiated by them.

My Worklist: My Worklist is a hyperlink on the User tab that serves as an electronic inbox. It allows regular users perform desktop duties such as viewing all tasks currently assigned to them.

Next: Next is a PHIMT navigation button that allows the regular user to proceed to the next step in an activity.

New: New is a PHIMT action button that allows the regular user to develop a new item patient, organization.

New Patient Record: New patient record is a hyperlink on the Patient Search Results screen that allows regular users to provide information about a new patient.

Organization: Organization is a PHIMT term used to refer to a Service or MTF.

Patient Profile: Patient profile is a hyperlink on the Patient tab that allows the regular user to create or edit patient information.

Patient Search: Hyperlink on the Patient tab that allows the regular user to look for a particular patient in the PHIMT database.

Patient Tab: Patient tab is a PHIMT tag or label that provides the user to patient specific activities.

PHI: PHI is an acronym for Protected Health Information.

PHIMT: PHIMT is an acronym for Protected Health Information Management Tool. PHIMT tracks disclosures of legally guarded information with regards to HIPAA compliance.

Regular User: Regular user is a PHIMT general role with basic functionality. This role can create disclosures and authorization requests that can be routed to a Privacy Specialist.

Request: Request is a PHIMT term that refers to the first step in initiating a disclosure activity.

Request Action: Request action is a PHIMT term that refers to a prompt for a specific performance (route to Privacy Specialist or route to your Worklist) to be taken on a disclosure.

Request Details: Request details is a PHIMT term that refers to allowing the regular user to view relevant information about a particular disclosure.

Requester: Requester is a PHIMT term that refers to the person making or issuing the disclosure activity.

Requester Profile: Requester profile is a hyperlink on the Requester tab that allows the regular user to view information about the individual or organization making the request.

Requester Summary: Requester summary is a hyperlink on the Requester tab that allows the regular user to view a brief of all requests initiated by an individual or organization.

Requester Requests: Requester requests is a hyperlink on the Requester tab that allows regular users to view a listing of all requests that were made by an individual or an organization.

Requester Tab: Requester tab is PHIMT term that refers to a tag or label that allows the regular user to access information about the individual or agency making a request for a disclosure.

Requests Tab: Requests tab is a PHIMT term that refers to a tag or label that allows the regular user to access information about the activities that have been requested by an individual or organization.

Restriction: Restriction is a PHIMT term that refers to a constraint put upon a particular disclosure activity. The constraint could refer to denying access to a particular individual or a particular time frame.

Routing: Routing is a PHIMT term that refers to the forwarding of an approval for the disclosure request to your worklist for later action, or to another individual. For example, a Regular User may forward the approval request to a Privacy Specialist.

Save: Save is an action button that allows regular users to save data entries, information, and procedures.

Search: Search is an action button that allows regular users to search for a particular individual or activity.

Search for Request: Search for request is a hyperlink on the Requests tab that allows the regular user to look for a particular request made by that person.

Select: Select is an action button that allows regular users to select a particular patient or activity.

Status Box: Status box is a PHIMT term that refers to a gray box in the upper left corner of all screens. This box displays the current information for a patient or activity; depending on actions being performed.

Summary: Summary is a hyperlink on the Patient tab that allows regular users to view a brief of all disclosure activities for a particular patient.

Summary Item Filter: Summary Item Filter is a feature accessed on the Patient Summary screen. This feature allows the regular user to display a synopsis on disclosures, suspensions, restrictions, reports, letters, and complaints.

Suspension: Suspension is a PHIMT term that refers to the act of delaying a disclosure or putting it on hold temporarily.

Switch Organizations: Switch Organizations is a hyperlink on the User tab that allows regular users, who are assigned to more than one organization to switch between their organizations. This allows them to change their primary status in an organization.

TMA: TMA is an acronym for Tricare Management Activity.

Update: Update is an action button that allows regular users to update information or perform additional activities.

User Role: User role is a PHIMT term that refers to a named collection of permissions. A role allows users with the same permissions to be grouped under a unique name such as: Regular User, User Admin, or Privacy Specialist. The MTF Privacy Officer usually determines the appropriate role.

User Tab: The User tab is a tag or label that allows the regular user to access all PHIMT user related information. This tab is designed to track all tasks that are assigned to you.

11.0 PHIMT REGULAR USER ROLE PERMISSIONS

PHIMT REGULAR USER PERMISSIONS	
PHIMT Regular User Tab	Enabled Permissions
Logon/Logoff	Both
Patient Tab	Create patient Generate form Generate letter Patient authorization Patient profile Patient search Patient summary Patient workflow View disclosure
User Tab	Change password Switch to other organizations Update address User profile User workflow User worklist Workflow activity Workflow request Workflows tab
Admin Tab	None (can attach file as part of another activity)
Requests Tab	Disclosure accounting Disclosure request Edit request: complete PHI retrieval Edit request: route to other user New request: route to Information Officer, Privacy Specialist, Other User, My Worklist
Requester Tab	Requester profile Requester summary Requester search Requester workflow

